

WHAT IS CLAIMED IS:

1
2 1. A portfolio investment method comprising:
3 selecting a portfolio comprising a plurality of startup investments;
4 determining a first commercial capitalization for each of the plurality of startup
5 investments;
6 determining at least one milestone for each of the plurality of investments;
7 determining at least a second commercial capitalization for each of the plurality
8 investments;
9 determining a maximum capitalization for each of the plurality of investments
10 which equals the sum of the first and the second commercial capitalizations for each of the
11 plurality of investments;
12 determining a portfolio capitalization;
13 receiving a capital contribution from at least one investor, wherein a sum of the
14 capital contribution from the at least one investor is greater than or equal to the portfolio
15 capitalization;
16 investing a first portion of the capital contribution into each of the plurality of
17 investments, wherein the allocation of the first portion to each of the plurality of investments is
18 less than or equal to the first commercial capitalization of each of the plurality investments;
19 determining if a milestone for each of the plurality of investments is met,
20 wherein the plurality of investments where a milestone is met are milestone investments and
21 the plurality of investments where a milestone is not met are restricted investments;

6. The method of claim 5, further comprising:

when the portfolio cumulated balance is less than or equal to the capital contribution, distributing, to the investor, the entire portfolio cumulated balance; and

when the portfolio cumulated balance is greater than the capital contribution, distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital contribution, and a share of the remaining portion of the portfolio cumulated balance.

7. The method of claim 2, further comprising:

returning an amount of an unspent portion of the first commercial capitalization of the milestone investments to the fund; and

reinvesting a remainder of the unspent portion of the first commercial capitalization into the milestone investment that contains the unspent portion.

8. The method of claim 7, further comprising:

returning the unspent portion of the second commercial capitalization of the milestone investments to the fund.

9. The method of claim 7, further comprising:

earning a first milestone profit from the milestone investment prior to investing the second portion;

returning a portion of the first milestone profit to the fund; and

4 when the portfolio cumulated balance is greater than the capital contribution,
5 distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital
6 contribution, and a share of the remaining portion of the portfolio cumulated balance.

1 13 The method of claim 2, further comprising:

2 returning all of an unspent portion of the first commercial capitalization and a
3 full amount of the second commercial capitalization of the restricted investments to the
4 fund;

5 returning an amount of an unspent portion of the first commercial capitalization
6 of the milestone investments to the fund;

7 reinvesting a remainder of the unspent portion of the first commercial
8 capitalization into the milestone investment that contains the unspent portion;

9 returning the unspent portion of the second commercial capitalization of the
10 milestone investments to the fund;

11 earning a restricted profit from the restricted investments;

12 returning the restricted profit to the fund;

13 earning a first milestone profit from the milestone investment prior to investing
14 the second portion;

15 returning an amount of the first milestone profit to the fund;

16 reinvesting a remainder of the first milestone profit into the milestone
17 investment that earned the profit

15. The method of claim 1 further comprising:

determining a seed capitalization for each of the plurality of investments;

determining the maximum capitalization for each of the investments which

equals the sum of the seed capitalization, and the first and the second commercial capitalizations for each of the plurality of investments;

prior to investing the first portion, investing a seed portion of the capital

contribution into each of the plurality of investments, wherein the allocation of the seed portion

to each of the plurality of investments is less than or equal to the seed capitalization of each of the plurality of investments.

16. The method of claim 15, wherein the above steps are performed by a fund.

17. The method of claim 16, further comprising:

returning all of an unspent portion of the seed capitalization to the fund;

returning all of an unspent portion of the first commercial capitalization and a

full amount of the second commercial capitalization of the restricted investments to the fund;

returning an amount of an unspent portion of the first commercial capitalization

of the milestone investments to the fund;

reinvesting a remainder of the unspent portion of the first commercial

capitalization into the milestone investment that contains the unspent portion;

returning the unspent portion of the second commercial capitalization of the milestone investments to the fund;

earning a restricted profit from the restricted investments;

returning the restricted profit to the fund;

earning a first milestone profit from the milestone investment prior to investing the second portion;

returning a portion of the first milestone profit to the fund;

reinvesting a remainder of the first milestone profit into the milestone investment that earned the profit

earning a second milestone profit from the milestone investment after investing the second portion;

returning a full amount of the second milestone profit to the fund;

determining a portfolio cumulated balance comprising:

summing all of the unspent portion of the seed capitalization of all investments

summing all of the unspent portion of the first commercial capitalization and the full amount of the second commercial capitalization of all the restricted investments;

summing all of the unspent portion of the first and the second commercial capitalizations of all the milestone investments;

summing all restricted profit from all the restricted investments;

summing all non reinvested first milestone profits from all the milestone investments;

prior to the receiving step, informing the investor of the milestone for each of the investments.

22. The method of claim 15, further comprising:

prior to the receiving step, informing the investor of the seed capitalization, the first commercial capitalization, the second commercial capitalization, and the maximum capitalization for each of the investments and the portfolio capitalization.

23. The method of claim 1, further comprising:

receiving a plurality of capital contributions from a plurality of investors,
wherein a sum of the plurality of capital contributions is greater than or equal the portfolio
capitalization.

24. The method of claim 1, further comprising:

receiving a plurality of capital contributions from a plurality of investors,
wherein a sum of the plurality of capital contributions is less than the portfolio capitalization;

optionally, reducing the portfolio capitalization, by removing at least one of the plurality of investments, to approximately equal the sum of the plurality of capital contributions; and

optionally, returning the plurality of capital contributions to the plurality of investors.

1 25. The method of claim 1, further comprising:

2 receiving a plurality of capital contributions from a plurality of investors,
3 wherein each of the plurality of capital contributions are of equal value.

1 26. The method of claim 1, further comprising:

2 receiving a plurality of capital contributions from a plurality of investors,
3 wherein each of the plurality of capital contributions are of varied value.

1 27. The method of claim 1, further comprising:

2 receiving a plurality of capital contributions from a plurality of investors,
3 wherein each of the plurality of capital contributions are of a tiered value.

1 28. A portfolio investment method comprising:

2 selecting a portfolio comprising a plurality of startup investments including
3 limited investments and staged investments;

4 determining a first commercial capitalization for each of the plurality of startup
5 investments;

6 determining at least one milestone for each of the staged investments;

7 determining at least a second commercial capitalization for each of the staged
8 investments;

9 determining a maximum capitalization for each of the plurality investments
10 which equals the sum of the first and the second commercial capitalizations for each of the
11 plurality of investments;

12 determining a portfolio capitalization;

13 receiving a capital contribution from at least one investor, wherein a sum of the
14 capital contribution from the at least one investor equals the portfolio capitalization;

15 investing a first portion of the capital contribution into each of the plurality of
16 investments, wherein the allocation of the first portion to each of the plurality of investments is
17 less than or equal to the first commercial capitalization of each of the plurality investments;

18 determining if the milestone for each of the staged investments is met, wherein
19 the staged investments where the milestone is met are milestone investments and the staged
20 investments where the milestone is not met are restricted investments;

21 permitting the investment of a second portion of the capital contribution into
22 each of the milestone investments, wherein the second portion is less than or equal to the
23 second commercial capitalization of each milestone investment; and

24 forbidding investment in the restricted investments other than the first
25 commercial capitalization.

1 29. The method of claim 28, wherein the above steps are performed by a fund.

1 30. The method of claim 29, further comprising:

returning an unspent portion of the first commercial capitalization of the limited investments to the fund.

31. The method of claim 29, further comprising:
 earning a limited profit from the limited investments; and
 returning the limited profit to the fund.

32. The method of claim 31, further comprising:

determining a portfolio cumulated balance comprising:

summing all of the unspent portion of the first commercial capitalization

the limited investments; and

summing the limited profit.

33. The method of claim 32, further comprising:

when the portfolio cumulated balance is less than and equal to the capital contribution, distributing, to the investor, the entire portfolio cumulated balance; and

when the portfolio cumulated balance is greater than the capital contribution, distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital contribution; and a portion of a remaining portion of the portfolio cumulated balance.

34. The method of claim 29, further comprising:

returning all of an unspent portion of the first commercial capitalization and a full amount of the second commercial capitalization of the restricted investments to the fund.

35. The method of claim 34, further comprising:
 earning an restricted profit from the restricted investments; and
 returning the restricted profit to the fund.

36. The method of claim 35, further comprising:

determining a portfolio cumulated balance comprising:

summing all of the unspent portion of the first commercial capitalization and the full amount of the second commercial capitalization of all the restricted investments; and

summing the restricted profit.

37. The method of claim 36, further comprising:

when the portfolio cumulated balance is less than and equal to the capital contribution, distributing, to the investor, the entire portfolio cumulated balance; and

when the portfolio cumulated balance is greater than the capital contribution, distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital contribution, and a portion of a remaining portion of the portfolio cumulated balance.

38. The method of claim 29, further comprising:

returning an amount of an unspent portion of the first and the second commercial capitalizations of the milestone investments to the fund; and

reinvesting a remainder of the unspent portion of the first commercial capitalization into the milestone investment that contains the unspent portion.

39. The method of claim 38, further comprising:

earning a first milestone profit from the milestone investment prior to investing the second portion;

returning a portion of the first milestone profit to the fund; and

reinvesting a remainder of the first milestone profit into the milestone investment that earned the profit.

40. The method of claim 39, further comprising:

earning a second milestone profit from the milestone investment after investing the second portion; and

returning a full amount of the second milestone profit to the fund.

41. The method of claim 40, further comprising:

determining a portfolio cumulated balance comprising:

summing all of the unspent portion of the first and the second commercial capitalizations of all the milestone investments;

5 summing all first milestone profits from all the milestone investments;
6 and
7 summing all the second milestone profits from all the milestone
8 investments.

1 42. The method of claim 41, further comprising:
2 when the portfolio cumulated balance is less than and equal to the capital
3 contribution, distributing, to the investor, the entire portfolio cumulated balance; and
4 when the portfolio cumulated balance is greater than the capital contribution,
5 distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital
6 contribution, and a portion of a remaining portion of the portfolio cumulated balance.

1 43. The method of claim 29, further comprising:
2 returning all of an unspent portion of the first commercial capitalization of the
3 limited investments to the fund;
4 returning all of an unspent portion of the first commercial capitalization and a
5 full amount of the second commercial capitalization of the restricted investments to the fund;
6 returning all of an unspent portion of the first and the second commercial
7 capitalizations of the milestone investments to the fund;
8 earning a limited profit from the limited investments;
9 returning the limited profit to the fund;
10 earning an restricted profit from the restricted investments;

11 returning the restricted profit to the fund;
12 earning a first milestone profit from the milestone investment prior to investing
13 the second portion;
14 returning a portion of the first milestone profit to the fund;
15 reinvesting a remainder of the first milestone profit into the milestone
16 investment that earned the profit;
17 earning a second milestone profit from the milestone investment after investing
18 the second portion;
19 returning a full amount of the second milestone profit to the fund;
20 determining a portfolio cumulated balance comprising:
21 summing all of the unspent portion of the first commercial capitalization
22 of all the limited investments;
23 summing all limited profits;
24 summing all of the unspent portions of the first commercial capitalization
25 and the full amount of the second commercial capitalization of all the restricted investments;
26 summing all the restricted profits;
27 summing all the first milestone profits;
28 summing all the second milestone profits;
29 when the portfolio cumulated balance is less than and equal to the capital
30 contribution, distributing, to the investor, the entire portfolio cumulated balance; and

when the portfolio cumulated balance is greater than the capital contribution, distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital contribution, and a portion of a remaining portion of the portfolio cumulated balance.

44. The method of claim 28, wherein the portfolio capitalization is greater than or equal to the sum of the maximum capitalizations for the plurality of investments.

45. The method of claim 28 further comprising:

determining a seed capitalization for each of the plurality of investments;

determining the maximum capitalization for each of the investments which equals the sum of the seed capitalization, and the first and the second commercial capitalizations for each of the plurality of investments;

prior to investing a first portion, investing a seed portion of the capital contribution into each of the plurality of investments, wherein the allocation of the seed portion to each of the plurality of investments is less than or equal to the seed capitalization of each of the plurality of investments.

46. The method of claim 45, wherein the above steps are performed by a fund.

47. The method of claim 46, further comprising:

returning all of an unspent portion of the seed and the first commercial capitalization of the limited investments to the fund;

returning all of an unspent portion of the seed and the first commercial capitalization and a full amount of the second commercial capitalization of the restricted investments to the fund;

returning all of an unspent portion of the seed capitalization, and the first and the second commercial capitalizations of the milestone investments to the fund;

earning a limited profit from the limited investments;

returning the limited profit to the fund;

earning an restricted profit from the restricted investments;

returning the restricted profit to the fund;

earning a first milestone profit from the milestone investment prior to investing the second portion;

returning a portion of the first milestone profit to the fund;

reinvesting a remainder of the first milestone profit into the milestone investment that earned the profit;

earning a second milestone profit from the milestone investment after investing the second portion;

returning a full amount of the second milestone profit to the fund;

determining a portfolio cumulated balance comprising:

summing all of the unspent portion of the seed capitalization and the first commercial capitalization of all the limited investments;

summing all limited profits;

25 summing all of the unspent portions of the seed capitalization and the
26 first commercial capitalization and the full amount of the second commercial capitalization of
27 all the restricted investments;
28 summing all the restricted profits;
29 summing all the first milestone profits; and
30 summing all the second milestone profits.

1 48. The method of claim 47, further comprising:
2 when the portfolio cumulated balance is less than and equal to the capital
3 contribution, distributing, to the investor, the entire portfolio cumulated balance; and
4 when the portfolio cumulated balance is greater than the capital contribution,
5 distributing, to the investor, a portion of the portfolio cumulated balance equal to the capital
6 contribution, and a portion of a remaining portion of the portfolio cumulated balance.

1 49. The method of claim 45, wherein the seed capitalization comprises only the
2 rights in the investment.

1 50. The method of claim 1, wherein the plurality of investments are productions.

1 51. The method of claim 50, further comprising:

producing each of the productions in a separate first venue and the first commercial capitalization for each of the productions equals a first venue production cost for each of the productions to produce each of the productions in the respective first venue.

52. The method of claim 51, wherein the milestone investments are milestone productions, further comprising:

producing each of the milestone productions in a separate second venue and the second commercial capitalization for each of the milestone productions equals a second venue production cost for each of the milestone productions to produce each of the milestone productions in the respective second venue.

53. The method of claim 52, further comprising:
producing some of the milestone productions in both the first venue and the second venue simultaneously.

54. The method of claim 50 wherein the determining a milestone for the investment comprises determining an objective performance based criteria for the production.

55. The method of claim 54, wherein the objective performance based criteria are ticket sales and weekly revenue against weekly expenditure

1 56. The method of claim 1, further comprising:

2 after the receiving step, informing the investor of the first commercial
3 capitalization, the second commercial capitalization, and the maximum capitalization for each
4 of the plurality of investments and the portfolio capitalization.

1 57. The method of claim 1, further comprising:

2 after the receiving step, informing the investor of the milestone for each of the
3 investments.

1 58. The method of claim 15, further comprising:

2 after the receiving step, informing the investor of the seed capitalization, the
3 first commercial capitalization, the second commercial capitalization, and the maximum
4 capitalization for each of the investments and the portfolio capitalization.

1 59. The method of claim 1, further comprising:

2 prior to the receiving step, informing the investor of at least one of the first
3 commercial capitalization, the second commercial capitalization, the milestone, and the
4 maximum capitalization for each of the plurality of investments and the portfolio capitalization;
5 and

6 after the receiving step, informing the investor of the remainder of the at least
7 one of the first commercial capitalization, the second commercial capitalization, the milestone,

8 and the maximum capitalization for each of the plurality of investments and the portfolio
9 capitalization not informed prior to the receiving step.

1 60. The method of claim 15, further comprising:
2 prior to the receiving step, informing the investor of at least one of the seed
3 capitalization, the first commercial capitalization, the second commercial capitalization, and
4 the maximum capitalization for each of the investments and the portfolio capitalization; and
5 after the receiving step, informing the investor of the remainder of the at least
6 one of the seed capitalization, the first commercial capitalization, the second commercial
7 capitalization, and the maximum capitalization for each of the investments and the portfolio not
8 informed prior to the receiving step.